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Project Management Checklists

FOR DUMMIES®

A Wiley Brand

Learn to:

- Develop projects with confidence
- Use checklists and self-check questions to save time in your projects
- Make sure all key actions and steps are carried out
- Complete vital project documents (with handy templates)

Nick Graham

Director of consultancy and training with Inspirandum Ltd.

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by Nick Graham

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Project Management Checklists For Dummies

Visit www.dummies.com/cheatsheet/pmchecklists to view this book's cheat sheet.

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Introduction

Project management is a challenge and it can also be great fun … when you're in control. However it can be a miserable existence being a Project Manager if you're not in control. Part of the secret of success is being organised, thinking things through thoroughly and not leaving important things out only to get tripped up later in the project. That's where the checklists and templates in this book come in. They help you develop an orderly approach where you can be confident that you've covered all the bases because you have everything you need checked off on the list.

As explain in the first chapter though, this isn't a list ticker's paradise. It's not about mindlessly ticking off the points just to fill the boxes. Rather it's about taking a professional approach to get things right and getting them right first time.

So, which would you prefer? A smoothly running project where you've thought things through up front, or fire-fighting one crisis after another because you forgot stuff? Of course that's not to say that you'll have a perfect project once you've read this book – projects are always unpredictable to some extent. But you'll have the pleasure of seeing your project in control and knowing that you're not encountering problems that were both predictable and avoidable if only you'd had a list to make sure that you'd covered everything.

About this Book

For Dummies books are designed so that you can dip in to them at different points according to what you need at the time. That’s true of this one too, but you’ll find it will help if you read Chapter 1 first anyway because that explains more about using the checklists and templates. And this book really is all about the checklists and templates.

Inside *Project Management Checklists For Dummies* you’ll find essential checklists covering everything you need to do to run your project smoothly (and plenty of advice on what you don’t need to do), as well as vital questions to ask yourself to check that you’ve overlooked nothing. You’ll also find lots of hints and tips to help you every step of the way.

Parts II-V of the book are made up of Checklists and Templates. The Checklists serve as to-do lists for certain activities, as reminders of documents to complete, and as failsafe lists to make sure you’ve thought of everything you need to. The templates, are typical documents that you need to complete during the course of a project. The Templates are included in the book and also on Dummies.com – so you can download and customise them to suit your project.

Foolish Assumptions

When writing this book, I assumed that those reading it will mostly be Project Managers. However, it’s also suitable for:

- Senior managers involved with setting up good project control and management (project governance) in their organisations.
- Project Steering Group members (such as the project’s Sponsor) who want to perform their role well and be effective in the project.

- Team Leaders who want to control their work well and perhaps go on to become Project Managers
- Project administration staff who want to be professional and highly effective in supporting Project Managers and Team Leaders.

I have assumed that you want to run, or help run, projects well. I have assumed that you want real project success not merely a pile of documentation and that you will use the checklists in this book intelligently.

If you're a project auditor then you'll find a chapter especially for you, and here I assume that you too are focused on project delivery and success, not on superficial compliance with documentation standards. In the chapter covering the audit role I've said that project auditors can make a valuable contribution if they approach the task correctly, and I assume that's exactly what you want as you start a project audit.

Icons Used in This book

The small icons in the left margins of the book are to alert you to special information in the text. Here's what they mean.

EXAMPLE This icon gives a real or hypothetical situation to illustrate a particular point in the text. Projects are a rich source of examples, so most of them are real life.

REMEMBER This icon points out important information you should keep in mind as you use the checklists and work on your project.

TIP This icon lets you in on handy advice and shortcuts that can save you time and effort.

WARNING! This icon highlights potential pitfalls and dangers.

Beyond the Book

In addition to the material in the print or e-book you’re reading right now, this product also comes with some access-anywhere goodies on the Web. Check out the free Cheat Sheet at `www.dummies.com/cheatsheet/pmchecklists` for some helpful key checklists.

You can also find many of the most important templates from this book reproduced as editable Word files at `www.dummies.com/extras/pmchecklists`.

Where to Go from Here

You can dip into this book to find help on the bit of your project that you’re currently working on. However, as pointed out earlier, you’ll find it helpful to read Chapter 1 first.

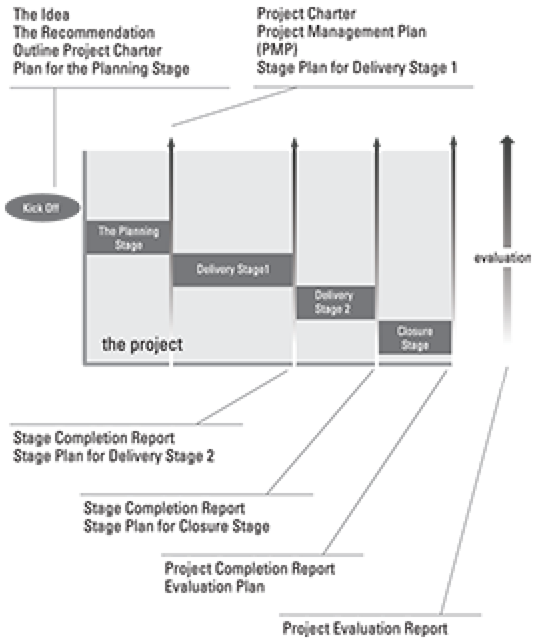
When you look at a particular checklist, bear in mind that you may need to alter it to fit the exact needs of your project. So where you go may be to grab a pencil or a computer and set up an adjusted checklist that will be of maximum help to you.

For documents, you don’t have to key in all the headings into your own document template. In the true spirit of helpfulness of the *For Dummies* books we’ve put Word and Excel versions of the templates in this book up on the website such as for a Risk Log and a Project Charter.

Although there’s a lot of help in this book, if you’re new to project management or some approaches such as ‘product based planning’ you may feel in need of a bit more help. If so, don’t despair. Where you can go from here is to get a copy of the UK edition of *Project Management For Dummies* which is designed to give much more help and advice.

Part I

Understanding Projects and Checklists


The Idea
The Recommendation
Outline Project Charter
Plan for the Planning Stage
Project Charter
Project Management Plan
(PMP)
Stage Plan for Delivery Stage 1
Kick Off
The Planning Stage
Delivery Stage1
Delivery Stage 2
Closure Stage
the project
evaluation
Stage Completion Report
Stage Plan for Delivery Stage 2
Stage Completion Report
Stage Plan for Closure Stage
Project Completion Report
Evaluation Plan
Project Evaluation Report

It can be a bit tough seeing where key documents fit into the project. If you find that, this diagram may help a bit. Don't think though that the focus is the documents. It isn't, but the documents – done well and kept concise – should prove to be a very helpful and powerful support.

In this part …

- ✓ Understand how to use the checklist and templates to full effect.
- ✓ Familiarise yourself with project structure.
- ✓ Find help on project standards.

Chapter 1

Using Checklists and Templates in Projects

In This Chapter

- The power of project checklists
- The types of checklist in this book
- Avoiding checklist pitfalls
- The templates and how to use them
- Understanding the Project Structure

This chapter, and indeed the whole of this first part of *Project Checklists for Dummies*, may seem a bit strange in a book of checklists. You may think that you just want to get going with your project and start ticking some boxes. However, to get the best out of the checklists and templates and use them really effectively you need to appreciate how to use them … and also how not to.

The checklists are designed to help you make sure that you have got everything right at different points in the project and haven't missed out anything important. It's so easy to make mistakes that are actually avoidable. As well as helping you to think things through for each project, the checklists also draw on lots of experience and help you make sure that you get it right for 'this' project, whether 'this' project is your first one or just your latest.

> *History repeats itself because nobody listens the first time.*

Anonymous

If you’re new to projects, it will also pay you to go through the last part of this chapter to understand the project structure that the checklists are designed to fit in with. If you’re already familiar with project structure you can skip that section if you prefer.

Using the Checklists

When running any project you’ll find that checklists are a very powerful tool. They help you to ensure that you produce sound, well thought-out plans and control documents the first time around. That will not only save time and trouble later, but will also help you develop a deserved reputation as a thorough and effective Project Manager.

This section gives you a few pointers on using the checklists, including tackling problems where you want other staff to use them too, but where they are not quite as keen as you. Some don’t like things like project methods and checklists, and say that they have no need of them because of their experience and knowledge.

I like the example of an airline pilot here. Imagine that you’re standing in an airport waiting to check in for your flight over the Atlantic Ocean. The captain and co-pilot for your flight happen to walk past you and you overhear what the Captain is saying. ‘I’m not bothering with the pre-flight checklist on this trip. I’ve been flying aircraft for years, I’m very experienced and I’m sure I’ll remember everything important.’ You might feel slightly unhappy about that and start scanning the departure board to see if you can find an alternative flight. You certainly wouldn’t take the captain’s words as a sign of expertise and professionalism.

Using checklists is not unprofessional; rather the reverse. As far as you possibly can, you want to be sure that you get things right and that you don't miss anything important. Quite apart from the consequences for the project if you get things wrong, avoiding problems will also save you a lot of time and hassle later.

I'm sure that you will use the project checklists in this book intelligently and appropriately, but to make absolutely sure you do, here are a few pitfalls to avoid.

- ✓ **Use the checklists thoughtfully:** Adjust them to the needs of your project, then use them. Otherwise you may be in danger of, for example, applying large project controls to a small project that simply doesn't need them. Continuing with the aircraft analogy from the start of this section, different aircraft have different pre-flight checklists.
- ✓ **Be extra careful in audit:** Following on from the last point, if you're using checklists to check up on someone else's project (Project Audit) don't apply some generic checklist to every project and ignore the individual project characteristics and specific control needs.
- ✓ **Don't get 'tick happy':** The objective is not to fill up all the boxes with ticks, but to do the project work so that you can tick the boxes – if you see the difference. When you tick a box it should mean that the item is properly dealt with.
- ✓ **Add to the checklists:** If you need extra things on the checklists because of the nature of those projects, then add them.
- ✓ **Take away from the checklists:** As a reverse of the last point, if you never need to do something that's on

a checklist then take it off. Always keep the checklists relevant to what you are doing.

In short, keep your brain in gear and don’t drive up project overheads by doing unnecessary work because you haven’t thought through whether everything on a checklist is relevant to your project.

Using Lists As An Expert – Or Not

You’ll find the checklists useful if you’re a project expert – back to the analogy of an experienced aircraft pilot. You’ll also find them useful if you are less experienced in project management and need a bit of help. The format used for the lists in the book looks like this.

☐ **Item**: Explanation and help.

If you’re very experienced, you can just run down the bold headed items to be sure that you’ve covered everything you need to. If you’re less experienced, or just unsure of a particular point, you’ll see that each checklist item is followed by a short explanation to help you see why that item may be important in your project.

Understanding Checklist Types

There are four different types of checklist in the book. Although you’d probably have spotted that anyway, it helps to explain up front what the types are so you can watch out for them.

- **Activity checklists:** The activity checklists are to make sure that you are doing, or have done, everything you need to at a particular point in the project. For example, if you’re approaching the end of a Delivery Stage, have you done all the necessary checking and preparation for the ‘Stage Gate’ review?
- **Thinking checklists:** This type of checklist helps you think across different areas to make sure that you’ve looked into all the areas that you need to. For example, when considering who the stakeholders in your project are, have you remembered customers and suppliers?
- **Completion checklists:** The completion type of checklist is to make sure that you’ve got everything. So, when you’re doing the organisation chart of who is needed for the project, have you got all of the management roles covered or have you missed one?
- **Information checklists:** These tell you about the range of things in a particular area. For example, when you’re writing a Business Case for your project, you have to be really clear about the three sorts of benefit, because they’re very different. There’s a checklist to say what the three types of benefit are and to briefly explain each one.

Using Templates

Templates are helpful, they really are, but of course you should use them intelligently as you do the checklists. In fact the same do’s and don’ts apply that are in the bullet point list in the ‘Using the Checklists’ section earlier in this chapter. Templates can work powerfully for you in four ways:

- To save you significant time and effort ‘re-inventing the wheel’, such as in designing a document from scratch when it would be much quicker to use a template.
- Even if you can’t quite use the templates in this book ‘as is’, you can use them as a starting point and adapt them. That’s usually a whole lot faster and much less effort than starting from scratch. You’re bound to want quite a few of the sections even if you take a few out and add one or two others in.
- To help instruct others on how documents should be completed, improving the relevance and accuracy of the information that they enter.
- To help make sure that you haven’t missed anything.

Following on from the second point in the list, many people assume that their organisation and its projects are going to be very different from everyone else’s. In fact the core of project management is very similar, so you may well find that you only need minor changes to the templates, or even none at all, in which case you can relax and go home early today.

In each main part of this book you’ll find one or two chapters of templates for things like documents, reports and logs. You, or your project team members, then replace the ‘advice’ text in each section with the actual content. Easy, huh? And it’s that ease of use which again demonstrates the value of project templates.

On the *For Dummies* web site (`www.dummies.com`) we’re also making the templates available in Microsoft Word format. That way you can load a template straight into your computer and you don’t have to copy all of the information out of the book. Helpful of us and sensible too, don’t you think? But then that’s why you bought a *For Dummies* title in the first place.

Understanding Project Structure

To understand how the checklists are used at different points in the project, the first step is to be clear on what those points are.

Figure 1-1 shows the main parts of any project. Some of it may be familiar to you, such as the use of *project stages* – or you may know them as *phases*. Having said that, this book starts with the work that’s needed before the project gets underway; and that part is both extremely important and frequently underestimated. Before you dive in and check whether you are setting up the project correctly, you first need to establish whether it really is a project.

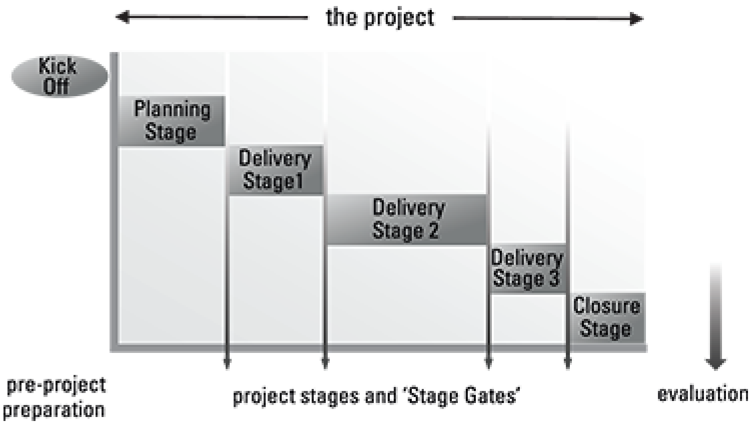

the project
Kick Off
Planning Stage
Delivery Stage1
Delivery Stage 2
Delivery Stage 3
Closure Stage
pre-project preparation
project stages and 'Stage Gates'
evaluation

Figure 1-1: The Project and What Comes Before and After.

The next few sub-sections cover the elements of Figure 1-1 in turn.

Kicking off the project

Some people say that just about everything is a project: Even, they claim, making a cup of tea. That’s a common myth and it’s absolutely untrue, so don’t be fooled for a moment. Projects have overheads, such as the work needed for planning, risk management, quality management and progress control. Not all work justifies such overheads. Sometimes you can do things as ‘normal’ work, perhaps even using a few project techniques, and it doesn’t justify putting in full project controls and structure. If that’s the case it’s not a problem, it just isn’t a project.

Before starting a project, you need to do three important things:

1. **Get an understanding of what will be involved and make sure that the work is worth doing – one way or another.**
2. **If the job is worth doing, decide whether it’s a project or should be tackled as ‘business as usual’ type work.**
3. **If it does look like a project, get some idea of what resource will be needed, find out whether that resource is available and then when the project could start.**

And guess what? A lot of the pre-project work in Kick Off is about those three exact things in the list above. Too many projects start. Many get a long way into planning or, even worse, begin the delivery work and then find out that actually the project isn’t worth doing. Getting into that position is bad news for two reasons. First, all of the people involved feel – very understandably – disappointed that all their hard work was a complete waste of effort. Second, your organisation has wasted valuable staff time and money. There may even be a strategic dimension to the impact. Another project may have been ruled out in favour of investing time and money in this one, and that project would have been genuinely worth doing. The strategic part of the impact can be very significant and it's easy to underestimate it.

You'll know from your own experience that most ideas sound great at first. It's only when you start working on an idea that you begin to realise that it's not quite as shiny and wonderful as you first thought and, to be brutally honest, there are an awful lot of drawbacks and problems. The idea of the Kick Off is to do a limited amount of work early on to investigate the idea and stop the project before it's even started if you discover that it isn't worthwhile after all.

Dealing with Kick Off in three steps

A good approach in Kick Off is to take it in three sequential steps. Don't think that all this pre-project work is going to take a long time, though, because almost always it won't. The approach actually reflects normal business handling of ideas.

1. **Rough out 'the idea' on a single sheet of paper.**

   Set down what it is and the advantages of doing the work. If that looks good when discussed with an organisational manager then …

2. **Work up the idea into a bit more detail and create a recommendation.**

   Your task here may include looking into a few different options for the way that the work is done and getting a bit of expert input if it's needed to make sure that the recommendation is realistic and technically sound. When the recommendation is reviewed by organisational managers, if it still looks good then you can ...

3. **Develop an Outline Charter (sometimes known as a Project Brief.)**

   This is a more detailed view and should be done by people including some with project experience not just business expertise. If, when the Outline is reviewed, it still looks good then the project can be started, a project team appointed and work begun in earnest on the full planning. If you’re not sure what documents like the Outline Charter are all about, then don’t worry a bit because they’re covered in Chapter 2.

The three steps can normally be completed in the space of two or three days, even for quite substantial projects. Notice too how the work increases through the steps. You only put more effort in if the idea is still looking good. If it turns out to be not such a good idea after all then the earlier you drop it the better, when less resource has been used investigating it.

Putting key roles in place

When the project starts it’s important to have project roles filled and defined clearly, so that people know what they are supposed to be doing and what everyone else is supposed to be doing too. There’s a checklist of roles for projects in Chapter 6. To make sense of later sections in this chapter though, I need to explain some now.

- ✓ **Project Steering Group:** The small group of senior managers with overall responsibility for the project, including its *project governance* (that it’s run properly). In a very small project, the Steering Group might be a single manager covering all of the roles.

- ✓ **Sponsor:** The chairperson of the Project Steering Group and the business manager ultimately responsible for the project.
- ✓ **Project Manager:** A manager with responsibility for the day-to-day running of the project. The Project Manager is accountable to the Project Steering Group and will attend all of its meetings. However the Project Manager isn't a part of that group.

Finding the Kick Off checklists and templates

You can find checklists to help you with Kick Off in Part II. That includes one for the roles and responsibilities in the project because as part of your Kick Off work you need to start thinking about who is needed for the project. You'll also find templates for the Idea, Recommendation and Outline in Chapter 7 within Part II.

Doing the Planning

If the Outline Charter (or just 'Outline' for short) shows that it's worth starting the project off, then the first stage of the project should be a planning stage. It's a bad mistake to rush into the work without proper plans. You'll only waste time and get confused when things start to go wrong, such as when you discover additional work that you hadn't realised would be needed. Also, you won't be able to control the project. If you don't know where you are supposed to be (because you haven't got a plan) how can you tell whether you're on track or not?

Planning the work of the project

You'll normally need to develop a number of plans in the Planning Stage. For the project work itself you're going to need two plans. The first is a Project Plan covering the whole project but at a high level of detail. The second is a more detailed Stage Plan for the first Delivery Stage – the one that comes immediately after the Planning